

July 2017 Agenda

The TechQuest agenda for March will include training classes designed to provide attendees with the latest information on how to maximize the development capabilities of OnBase. As always, conference attendees receive all food and beverages associated with lunch, as well as two evening dinner events. The evening events provide time to network with fellow attendees as well as Hyland Software technical professionals.

Sunday, July 16

09:00AM - 05:00PM

001 Preparing for Installer Recertification

This session will give attendees space to complete labs that are directly related to the OnBase Installer Recertification exam. There will be an OnBase Trainer available for questions during this self-directed workshop. This class does not count towards certification and the exam will not be delivered during this session. This session will use OnBase 16. *You must be an OnBase Certified Installer in order to attend this session.

002 Custom Solutions with WorkView

Learn how to take advantage of the substantial WorkView changes in OnBase and see how to leverage the new Case Management product.

003 Introduction to Integrating with Application Enabler

Would you like to have documents tied to your line of business application allowing your end user's to see the full picture without clicking? Join us as we begin the journey of integrating Line of Business applications to OnBase. We will drive through Application Enabler learning the basics of configuration to create that connection. You will leave this session with a basic understanding of how to configure a Line of Business application to retrieve and/or index documents as well as deployment options and new OnBase features!

004 Building Your First Solution with the Capture Process Designer (NEW)

You are invited to learn about Capture Process Designer (CPD) which was introduced in OnBase 16. This class will cover how, why and when to use CPD based on your solution requirements. You will learn how to customize batch processes and implement custom logic to enhance your OnBase Capture processors using CPD, as well as experience hands on training designing real world solutions. *This class is different than "Introduction to Capture Process Designer" in that it goes deeper into solution design.

Monday, July 17

09:00AM - 05:00PM

101 Advanced Custom Solutions with WorkView

Learn how to take advantage of the substantial WorkView changes in OnBase and see how to leverage the new Case Management product.

102 Installer Recertification

Installer Recertification is designed to qualify current OnBase Certified Installers (OCI) for an additional two years. This session is required to maintain an individual's OCI status. The focus will be on three major areas: critical areas to prepare for on the exam, changes to OnBase functionality that influence installations and new OnBase functionality that is required knowledge for OnBase Installers. This session will use OnBase 16. If an individual has been expired on their OCI certification for 6 or more months, they should attend a regularly scheduled Installation Certification course instead.

09:00AM - 12:30PM

111 OnBase Latest Enhancements

OnBase Latest Enhancements & Features is designed to get you better acquainted with some of the exciting new modules, features, and enhanced functionality that OnBase has to offer. The session provides interactive, hands-on activities of the changes in OnBase and how they directly impact system administration as well as the new features and best practices for administrators.

112 Integrations Overview (NEW)

OnBase offers a lot of ways to create integrations and choosing the right tool can be difficult. We'll cover all of the available tools in the toolbox to help you identify which one is the right one for the job. We'll focus on modules like DIP, Application Enabler, the Unity API and more.

113 EDMS, DKT, and Document Composition

Organizations that develop new policies, work with contracts, or generate dynamic correspondence have unique challenges. In some cases, the documents must be developed through several rounds of review and each version maintained for historic or compliance reasons. These types of process are handled exceptionally well when combining the power of OnBase's EDM Services, Document Composition, and Document Knowledge Transfer and Compliance. While each of these alone solve business challenges, together, they can provide our organization with a full suite of tools to effectively collaborate, approve, version stamp, create, and ensure review of critical business documents.

114 Advanced Capture

Are you manually indexing Structured and Semi-Structured documents? If so, why not automate the process and increase data accuracy? This session provides hands-on configuration and processing of Structured and Semi-Structured documents using OnBase Advanced Capture. Come and learn the tools to extract data from the content of the document, from barcodes, check boxes, and more!

117 Process Analysis: Critical Tools for Building a Foundation

Learn the tools to more effectively analyze a process and identify critical components and opportunities. Participants will learn about flow, variation, cycle time, lead time, defects; and the tools used to understand where to start. "Improve this process" can mean a lot of things. Participants will learn where to begin and how it creates a foundation for automation.

12:45PM - 01:15PM

Lunch & Learn: Lessons Learned from Hyland's OnBase Admins

Details Coming Soon!

01:30PM - 05:00PM

161 Moving Up: Resources, Tools & Best Practices for Upgrading OnBase

For many organizations, upgrading OnBase can be a tricky task – but it doesn't need to be! Join our experts as they share best practices and point you to the resources and tools that OnBase professionals in Hyland's Global Services, Technical Support & Quality Assurance departments have developed over the years to ensure a smooth and successful upgrade process. Participate in hands-on activities, discuss planning and testing strategies, compare & contrast a traditional upgrade to an incremental parallel upgrade and get answers to your real-world questions and concerns from Hyland's technical experts.

162 What's New with the Unity API

Learn about the new features introduced to the Unity API from our API experts. This course will cover new features and methods introduced to the Unity API in OnBase 14 and 15, as well as new hooks introduced in OnBase that enable solution developers to use the API in new and exciting ways. Formerly known as OnBase API Enhancements

163 Building the User Experience in OnBase (NEW)

Details Coming Soon!

164 Intelligent Capture for Accounts Payable

Join us in discovering all the simple, effective techniques for extracting the sometimes difficult-to-find values in Accounts Payable documents. Learn about the Intelligent Capture for Accounts Payable solution that can automatically identify documents and extract the necessary data for faster, more cost effective invoice processing without the need to create document templates.

165 Workflow Latest Enhancements

Workflow has grown substantially over the years. These changes modify not only Workflow triggers, but introduce new functionality for handling keywords, designing and migrating solutions, and logging functionality. This course will cover not only the changes, but how to appropriately add them to new and existing solutions.

166 Extending your Existing Solution with ShareBase

Organizations are often challenged by delivering files for review and collaboration to others, both inside and outside their organization, that is also secure and supports IT oversight and auditing. With ShareBase, Hyland's new enterprise-class file sync and share application, organizations seamlessly incorporate file sharing and collaboration into their existing solutions. This course will explore the functionality of ShareBase and how to use it to extend an organization's reach as well as alleviate the need for emailing sensitive data or compromising security when handling corporate data. Attendees will learn ShareBase functionality and how to automate the sharing, collaboration and ingestion of documents through ShareBase.

Tuesday, July 18

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201 Installer Recertification

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09:00AM - 12:30PM

211 API Overview for Non-Programmers

As someone involved with OnBase, you need to know what's possible through the OnBase APIs. While you may never code a single line, understanding what APIs are available, when they should be leveraged, and what they're capable of is critical to making informed design decisions. Beyond that, this course will help you communicate with your developers and understand how to bridge the gap from OnBase functionality to custom capabilities using our APIs. You'll leave with a firm understanding what the APIs can provide to new and existing solutions.

212 OnBase Studio: Workflow

OnBase Studio expands upon the way we develop and deploy Workflow solutions. The OnBase Studio creates a flexible, intuitive Workflow configuration environment that substantially extends the functionality and display of Workflow Life Cycles. From determining issues in real-time to customizing the entire graphic layout to automatically generating solution documentation, the OnBase Studio will substantially improve the way Workflow designers build, maintain, and grow solutions.

213 Crafting Mobile Business Solutions

As the number of mobile users participating in solutions is increasing, OnBase professionals need to understand how to develop new solutions, and expand their existing solutions, for the mobile workforce. This course will cover not only the essentials of building the mobile server, it will focus on the functional changes to solutions that allow them to be presented to the mobile users. The course will also cover best practices for solution design, particularly when dealing with forms and Workflow solutions, to ensure that mobile users can access important information, make timely decisions, and limit the amount of time required to complete their work. From claims adjustment to in-home care, this course will cover the essentials to getting your solution away from the desk.

214 Intelligent Classification

Learn how Intelligent Classification, new in OnBase 16, allows you to automatically identify your documents brought in through imaging. You'll also look at how this can streamline your indexing process and become part of your overall capture solution.

215 Self-Paced Labs: Exploring the Latest Functionality

This course allows you to complete self-paced labs, supported by Hyland technical staff. Go at your own pace and truly understand what it takes to complete the following:

1. Advanced Capture
2. Application Enabler
3. COLD and Esri Maps in Unity Analyze Data
4. Document Composition
5. Document Composition: Advanced Conditions
6. DKT and Compliance
7. Exception Reports
8. Folders and File Cabinets
9. Image Form Composition
10. Intelligent Capture for Accounts Payable
11. Intelligent Classification
12. Interactive Data Capture
13. Mailbox Importer
14. Outlook Integration – User Lab
15. ShareBase – OnBase Interaction
16. ShareBase – Web User Interface
17. Reporting Dashboards
18. Unity Forms Part 1
19. Unity Forms Part 2
20. Unity Forms – User Lab
21. Web Services Publishing
22. Workflow Approval Management
23. Workflow: An Introduction – Part 1
24. Workflow: An Introduction – Part 2
25. Workflow: Beyond the Basics
26. Workflow Notifications
27. Workflow Events
28. WorkView Case Manager
29. Using WorkView with Context Search
30. AutoFill Keyword Sets
31. Capture Process Designer
32. Redaction Configuration

Each lab includes step by step guidance with a detailed explanation to help ensure you comprehend the process. So whether you want to expand upon what you've learned in class or explore a new product or functionality, this hands-on lab environment is the perfect opportunity for you.

216 OnBase Latest Enhancements

OnBase Latest Enhancements & Features is designed to get you better acquainted with some of the exciting new modules, features, and enhanced functionality that OnBase has to offer. The session provides interactive, hands-on activities of the changes in OnBase and how they directly impact system administration as well as the new features and best practices for administrators.

217 Accidental DBA - Performance, Maintenance, and Caring for a Database

The DBA (Database Administrator) for many customers is not a DBA by training, but by accident. The goal of this session is to fill in the gaps for the Accidental DBA (sometimes referred to as an Involuntary DBA) and round out that person's knowledge of what is needed to successfully administer an OnBase database. Any individual that is responsible for the administration of an OnBase database, or wants to take back recommendations for the OnBase database to their DBA, should attend this class. The following topics will be covered in this technical session: -Instance and database configuration and settings (specific to OnBase) - Maintenance recommendations and strategies Capturing baselines and monitoring performance -Troubleshooting performance issues Attendees should be familiar with their current (or proposed) OnBase database configuration, and should be prepared to participate in discussions related to configuration and maintenance.

12:45PM - 01:15PM

Lunch & Learn: Administering your OnBase Solution in the Hyland Cloud

Learn how to efficiently configure and administer your OnBase OnLine solutions. We will cover how to access the solution, how to ingest files, using the Cloud Portal and much more!

01:30PM - 05:00PM

261 Beginner's Guide to Extending WorkView with the OnBase API

Learn how to extend the power of WorkView | Case Manager via the Unity API in order to work with and manipulate objects, integrate, and so much more. This class is for Unity API developers familiar with WorkView basics who are looking extend their knowledge about coding for WorkView | Case Manager. Topics covered will include how to access WorkView objects, all about attribute retrieval and modification, querying for WorkView objects, WorkView Unity Automation API events, and more. The class will include best practices in WorkView Unity API development and hands-on coding labs with instructor guidance. Formerly known as WorkView Unity API / Extending WorkView with the OnBase API

262 Web Server Security

This session focuses on enhancing the OnBase Web Server's security by exploring the various accounts used and what their permissions should be, how SSL/TLS affects the server, how Public-Key encryption works, and how to deploy the OnBase Web Server in a secure method.

263 Workflow Latest Enhancements

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264 Introduction to Capture Process Designer (NEW)

Capture Process Designer allows you to create custom scan queues with flexible routing logic and processes in the order you would like. This new functionality addresses many of the limitations to Legacy Scan Queues and enhances overall the processing of documents through a scan queue. This course will explain the limitations of Legacy Scan Queues, how these limitations are addressed using Capture Process Designer and also the fundamentals of Capture Process Designer and Custom Scan Queues. After taking this course you should have a base level knowledge of custom scan queues and how to begin using them within your OnBase Solutions.

265 Self-Paced Labs: Exploring the Latest Functionality

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266 Beginner's Guide to the Unity Platform

Learn to revolutionize how your users do work! This session will cover a wide range of features from the Unity basics to advanced administrative options available in OnBase. From an integrated workflow process to organizing work into the personal page, you will learn how improve your end users experience and empower your OnBase Administrators.

267 OnBase Security Foundations: Access Controls From The Ground Up (NEW)

Nearly every aspect of cyber security can be boiled down to one concept: access. In this class, you'll learn about the many ways users can be given access to the data inside of your OnBase environment. We'll discuss and interact with best practices and give you the tools to find out how much access your users really need, providing them with highly usable privileges without compromising your environment's security.

Wednesday, July 19

09:00AM - 12:30PM

311 OnBase Portal Solutions: External Access to OnBase

Organizations often need to provide access beyond their internal employees and that's where Portal Solutions come in. This course will explore the various options available to provide access to others who are not in your employee base. We will then focus on a recent enhancement to OnBase - The External Access Client. You'll learn how to create a branded and customized user experience that you can leverage inside and outside your organization that is more focused and streamlined than a traditional client. We'll cover use cases and opportunities to employ this extended capability.

312 Making the API and Workflow Work Better Together

This session is aimed at developers who have completed the OnBase API course, and are now looking for practical advice on how to use it. Specifically, this will discuss best practices and common design considerations when using the Unity Automation API to extend a Workflow solution.

This will include coding considerations such as error handling and tricks with the built-in development environment. The course also emphasizes designing the solution to work with Workflow and OnBase functionality. If you are adding functionality to one or more extensive life cycles (possibly maintained by someone other than you), how do you divide up responsibilities between the Workflow and your custom code? How will you structure the communication between these two systems? If there are errors, will they be understandable by an administrator who doesn't know how to program? These questions will be addressed through hands-on labs. Please note that this is an advanced session and it will be assumed that all students are already familiar with the Unity API.

Formerly known as Unity Workflow API Scripting Best Practices

313 Introduction to Unity Forms

Whether you're a business process owner, an OnBase Administrator, or a Forms Developer, building feature rich forms is a cinch with the Unity Forms Designer. In the Introduction to Unity Forms course we'll cover the basics of building a Unity Form: add Keywords, Datasets, line items, and a variety of other controls to your form; improve form usability with Autofill functionality; customize your form with Themes, logos and other images; create multi-page forms with tabs; restrict access to form sections or pages with user group based security; and more!

314 WorkView in OnBase 17

Details Coming Soon!

315 Intelligent Capture for Accounts Payable

Join us in discovering all the simple, effective techniques for extracting the sometimes difficult-to-find values in Accounts Payable documents. Learn about the Intelligent Capture for Accounts Payable solution that can automatically identify documents and extract the necessary data for faster, more cost effective invoice processing without the need to create document templates.

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317 Security Lab: Advanced OnBase Fortifications (NEW)

OnBase security doesn't stop at clicking check boxes in Configuration. In this 100% hands-on lab, you'll get direct experience with building the advanced fortifications provided and supported by OnBase. We'll walk through setting up various encryption options to protect data at rest and in transit. You'll also learn how to protect the keys to your kingdom and keep even the most privileged users from accessing your most important data.

318 Extending your Existing Solution with ShareBase

Organizations are often challenged by delivering files for review and collaboration to others, both inside and outside their organization, that is also secure and supports IT oversight and auditing. With ShareBase, Hyland's new enterprise-class file sync and share application, organizations seamlessly incorporate file sharing and collaboration into their existing solutions. This course will explore the functionality of ShareBase and how to use it to extend an organization's reach as well as alleviate the need for emailing sensitive data or compromising security when handling corporate data. Attendees will learn ShareBase functionality and how to automate the sharing, collaboration and ingestion of documents through ShareBase.

12:45PM - 01:15PM

Lunch & Learn: Electronic Plan Review

Come learn how the OnBase Electronic Plan Review product enables government agencies and other organizations to automate the review and approval processes for construction plans and documents. The solution eliminates the complex management and storage of large paper plan sets by providing an online portal for submission of plans and specialized tools for reviewing, marking and compiling plan review documents. Get hands-on training to understand how the product works including the latest base workflows. We'll discuss typical implementation methods and challenges and give a comprehensive overview of the new plan viewer.

01:30PM - 05:00PM

361 WorkView Solution Discovery Strategies and Practices

WorkView | Case Management solutions are a powerful addition to your ECM strategy. However, as with any solution development, there are questions that need to be answered before you start crafting your application. This course covers the discovery strategies that should be employed to ensure your solution is successful, not only for users, but for the expansion and adaptability of the solution in the future. This course walks you through process to of understanding what is needed for a comprehensive solution and the questions you'll need to answer before you start configuring.

362 Viewing OnBase Documents from Your External Application

If you need a quick way to display OnBase documents from your custom applications, you have a variety of choices. Many of these, called the "POP integrations", can be used easily with little or no code development! If you use the Web Server, the Unity Client, or Application Enabler, you already have access to this powerful, easy to use functionality. Even experienced programmers often find that the POP integrations are the quickest and most effective way to integrate with their custom applications. However, developers have additional options such as ActiveX controls, API calls, and Unity Client Automation. This course is intended for everyone, regardless of programming ability. The first half covers ways to link to documents from outside OnBase simply by providing a URL, and no coding is necessary. The second half focuses on further options available to developers. Note that this combines two previously-available courses: POP Integrations Class and Document Viewing Options for Custom Integrations

363 Advanced Unity Forms

Unity Forms are easy to build, but that doesn't mean they have to be simple. Add robust functionality to your Unity Forms with new features available in OnBase. In the Advanced Unity Forms course we'll explore the latest features available in Unity Forms: make forms easier to use with Cascading Datasets and Calculated Fields; add dynamic functionality to your forms with Custom Actions; use Signatures to verify form values; use the Drawing Control to capture graphical information on your forms; and more!

364 Troubleshooting OnBase Workflow

We have a deeply troubled Workflow solution and we need your help in fixing it. Throughout this session, we'll work hands-on with Workflow troubleshooting tools and methods, we'll discuss how design influences the type and quantity of issues over time, and look at how to repair a Workflow solution and how to determine if that repair will break something further downstream or parallel in the process. You'll leave understanding the common design mistakes, how to trace an issue back through a process, and the tools you can leverage for the common challenges encountered.

365 Advanced Capture

Are you manually indexing Structured and Semi-Structured documents? If so, why not automate the process and increase data accuracy? This session provides hands-on configuration and processing of Structured and Semi-Structured documents using OnBase Advanced Capture. Come and learn the tools to extract data from the content of the document, from barcodes, check boxes, and more!

366 Self-Paced Labs: Exploring the Latest Functionality

This course allows you to complete self-paced labs, supported by Hyland technical staff. Go at your own pace and truly understand what it takes to complete the following:

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367 Reporting Dashboards

OnBase can provide incredible information to corporate decisions makers. But the information is not always made readily available to these business leaders. This course will explore the many options an OnBase Professional has to effectively arm corporate leaders to understand processes and make decisions. Special focus will be given to cross-client functionality, customized forms, and reporting.

368 Process Analysis: Critical Tools for Building a Foundation

Learn the tools to more effectively analyze a process and identify critical components and opportunities. Participants will learn about flow, variation, cycle time, lead time, defects; and the tools used to understand where to start. "Improve this process" can mean a lot of things. Participants will learn where to begin and how it creates a foundation for automation.

Thursday, July 20

09:00AM - 12:30PM

411 Importing OnBase Solutions

Inevitably, one of your friends is going to ask you to help them move. But what do you do when they want your help moving an OnBase solution instead of their collection of precious snow globes? That's what this class is about! With the latest enhancements to Workflow and WorkView, there's never been a better time to craft custom solutions to solve business needs. But what do you do when it's time to make the jump from development and test systems to production? You leverage OnBase Import / Export. Learn the latest enhancements to the powerful functionality in OnBase to make solutions ready for prime time. You'll learn how to leverage the export, save time on frequent import paths, and review best practices for importing hybrid Workflow / WorkView solutions. It'll be better than trying to move your friend's sofa up to the attic!

412 What's New with the Unity API

Learn about the new features introduced to the Unity API from our API experts. This course will cover new features and methods introduced to the Unity API in OnBase 14 and 15, as well as new hooks introduced in OnBase that enable solution developers to use the API in new and exciting ways. Formerly known as OnBase API Enhancements

413 Process Analysis: Lean Six Sigma in Today's World (NEW)

Learn the basics of lean six sigma to more effectively assess qualitative and quantitative opportunities to improve process, product, and service outputs. Participants will gain real world examples of 5S, Visual, and Standard Work; how it applies in their work area; and where to start. They will understand the rigorous and systematic methodology known as DMAIC (define, measure, analyze, improve, and control) used to reduce defects and variation.

414 OnBase Portal Solutions: External Access to OnBase

Organizations often need to provide access beyond their internal employees and that's where Portal Solutions come in. This course will explore the various options available to provide access to others who are not necessarily in your employee base. This course will then focus on one of the latest enhancements to OnBase - The External Access Client. You'll learn how to create a branded and customized user experience that you can leverage inside and outside your organization that is more focused and streamlined than a traditional client. You'll cover use cases and opportunities to employ this extended capability.

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417 Problems Solved! Support Issues and the Resolutions You'll Love, an Open Forum

Support partners with many organizations each year to investigate, identify, and resolve OnBase issues. Join us for a discussion of the most intriguing, relevant, and enlightening support issues we've seen over the past year. You can also bring your challenging OnBase support issues and discuss with the experts on how to find resolution. You'll put on your sleuthing caps as we share facts and see if you can determine the answer to the more interesting support requests we encountered. Match your OnBase experience against others as we explore how to respond to the common question "What's wrong with my system?"

418 Designing, Monitoring, and Troubleshooting Workflow Performance

As workflow solutions become more crucial to an organization's success, and as solutions grow and evolve over time, special attention is needed to ensure that the solutions performance remains optimal. This session will demonstrate design techniques, best practices, and considerations that build a higher performing solutions. Attendees will also look at tools that can be leveraged to monitor the performance of solutions to identify bottlenecks and obstacles. Additionally, this session will look how to troubleshoot and resolve some common performance issues.

12:45PM - 01:15PM

Lunch & Learn: Integrating OnBase and DocuSign: See what's new!

The OnBase Integration for DocuSign® eSignature provides a complete solution for business processes that require secure digital signatures on critical documents, while adding additional value through process automation, a complete audit history and more. OnBase 17 introduces new enhancements to bring more value organizations that are seeking improved automation and management of their signature solution. Check out what's new and see a live demo of the integration in OnBase 17!

01:30PM - 05:00PM

461 OnBase & Maps: Enhancing OnBase using Geospatial Content (NEW)

Maps are changing the way we see the world. They help create a fuller understanding of how, what, and where things are happening. OnBase has the ability to take advantage of the power of maps in a myriad of ways to increase the usefulness of OnBase data, whether you have a full-fledged GIS system or don't even know what GIS stands for. The Integration for Esri can give GIS users easy access to OnBase content directly in the maps they use every day. Alternatively, it can allow OnBase users to pull the power of maps into the OnBase world and add another dimension of analytics to their decision making. In Reporting Dashboards, geospatial data can be paired with OnBase data to allow users to see where their data is coming from. This course will explore the different ways of coupling OnBase with maps to give your users access to the content they need. Special focus will be given to configuring featured based document retrieval from Esri applications and accessing maps from within the Unity Client.

462 API Workshop

This course allows you to complete self-paced labs, supported by Hyland technical staff. The labs will focus on the most common Unity API features, new Unity API features, and the different locations through the client where the Unity API can be leveraged. The labs are the perfect way for a developer familiar with the Unity API to try out new features and all of the new hooks in the Unity Client where a script can execute from.

463 Troubleshooting OnBase Workflow

We have a deeply troubled Workflow solution and we need your help in fixing it. Throughout this session, we'll work hands-on with Workflow troubleshooting tools and methods, we'll discuss how design influences the type and quantity of issues over time, and look at how to repair a Workflow solution and how to determine if that repair will break something further downstream or parallel in the process. You'll leave understanding the common design mistakes, how to trace an issue back through a process, and the tools you can leverage for the common challenges encountered.

464 Crafting Mobile Business Solutions

Details Coming Soon!

465 Intelligent Classification

Learn how Intelligent Classification, new in OnBase 16, allows you to automatically identify your documents brought in through imaging. You'll also look at how this can streamline your indexing process and become part of your overall capture solution.

466 Self-Paced Labs: Exploring the Latest Functionality

This course allows you to complete self-paced labs, supported by Hyland technical staff. Go at your own pace and truly understand what it takes to complete the following:

1. Advanced Capture
2. Application Enabler
3. COLD and Esri Maps in Unity Analyze Data
4. Document Composition
5. Document Composition: Advanced Conditions
6. DKT and Compliance
7. Exception Reports
8. Folders and File Cabinets
9. Image Form Composition
10. Intelligent Capture for Accounts Payable
11. Intelligent Classification
12. Interactive Data Capture
13. Mailbox Importer
14. Outlook Integration – User Lab
15. ShareBase – OnBase Interaction
16. ShareBase – Web User Interface
17. Reporting Dashboards
18. Unity Forms Part 1
19. Unity Forms Part 2
20. Unity Forms – User Lab
21. Web Services Publishing
22. Workflow Approval Management
23. Workflow: An Introduction – Part 1
24. Workflow: An Introduction – Part 2
25. Workflow: Beyond the Basics
26. Workflow Notifications
27. Workflow Events
28. WorkView Case Manager
29. Using WorkView with Context Search
30. AutoFill Keyword Sets
31. Capture Process Designer
32. Redaction Configuration

Each lab includes step by step guidance with a detailed explanation to help ensure you comprehend the process. So whether you want to expand upon what you've learned in class or explore a new product or functionality, this hands-on lab environment is the perfect opportunity for you.

467 Database Design and Administration for OnBase WorkView Solutions

This course will take attendees through the best practices associated with database and WorkView class design, attribute characteristics, indexing, and filter design in order to create the most effective and efficient OnBase WorkView solution possible. Many hands-on database and WorkView design examples will be used along with numerous real-world examples of situations where proper design was a critical success factor.

468 Redesign Techniques and Best Practices for Removing Scripts from Workflow

You no longer have to write code to do math in your Workflow and forms processes. You can not only do math, but so much more, without scripting. Learn how to extend the capabilities of your OnBase system by using essential Workflow capabilities to replace customized scripts, including alternatives to integrations, line item comparisons, data manipulation and more. We may even show you how to only send one notification per user per day from your Workflow notifications. All this and more as we craft compelling functionality that will be supported through an upgrade path and not rely on development resources. Cookies may be served.

Friday, July 21

09:00AM - 05:00PM

501 Building a Workflow Solution with the Professionals

Work alongside an experienced Workflow Developer to create specific functional elements of Workflow. You'll learn how Hyland approaches solution design and the factors that drive those design decisions. This session will walk you through creating boxed versus expandable solutions, and how to factor performance into solution coding. You'll walk away knowing the five factors to consider for an ad hoc task, timer, or queue.

09:00AM - 12:30PM

511 Folder Solutions and Document Retention

One of the most powerful user access tools is the OnBase Folder system. The File Cabinet and Folder structure is familiar to users more comfortable with paper environments and OnBases Folders allow you to create multiple views of the same collection of documents based on each user groups needs. From folders that represent entire business relationships, to folders that identify missing documents, to folder level notes and lookup values, OnBase folders give you the power to craft a power user experience. This course will take users through the design, setup, troubleshooting, and maintenance of the OnBase folder environment and provide best practices for deploying in your organization.

512 API Best Practices and Session Management

In this session, we will review some of the common issues that an OnBase Developer faces and what the correct solutions are to these situations. We will also talk about other tips that can improve the development experience and the effectiveness of the solution being created. Ideal for the beginner looking to learn everything they can to be effective in creating an API solution, this session emphasizes critical information that can help in the development process. To the experienced API developers, this will ensure you are following the best practices and introduce a topic or two you didn't know. Formerly known as Unity API Tips and Tricks

513 Introduction to REST OnBase Web Services

In today's fast paced technology landscape, it has become increasingly important for applications to quickly and easily inter-operate with each other. SOAP and REST services exist to make this communication quick, simple, standard, and accessible. They allow IT staff to work in their language of greatest comfort and reduce the need to understand the complexities of an application's lower level APIs. Come work hands on with OnBase's capabilities to publish REST and SOAP endpoints. Participants will learn how to publish OnBase Web Services in minutes directly from OnBase Studio via simple wizard interfaces. The class will also cover how these services can be easily consumed via a myriad of programming interfaces and languages.

514 Creating a Test Plan (NEW)

Testing... 1,2,3... is this thing on? Do you have trouble moving a project from Implementation to Go-Live? Have you ever designed the perfect solution, only to have unforeseen ramifications cause you to make Production fixes just to keep the project going? Have you ever had a user "test" a solution, only to find that the test only covered part of the solution? This session provides tools to help put structure around one of the most important phases of a project: Testing. Discuss the difference between Functional Testing and User Acceptance testing, as well as build sample test cases to help create your own test plan.

515 Designing, Monitoring, and Troubleshooting Workflow Performance

As workflow solutions become more crucial to an organization's success, and as solutions grow and evolve over time, special attention is needed to ensure that the solutions performance remains optimal. This session will demonstrate design techniques, best practices, and considerations that build a higher performing solutions. Attendees will also look at tools that can be leveraged to monitor the performance of solutions to identify bottlenecks and obstacles. Additionally, this session will look how to troubleshoot and resolve some common performance issues.

516 Reporting Dashboards

OnBase can provide incredible information to corporate decisions makers. But the information is not always made readily available to these business leaders. This course will explore the many options an OnBase Professional has to effectively arm corporate leaders to understand processes and make decisions. Special focus will be given to cross-client functionality, customized forms, and reporting.

517 Agenda Management (NEW)

The OnBase Agenda Management suite has come a long way in the past few years – come learn about all the great features that allow government organizations, corporate boards, universities and any other formal meeting bodies to effectively manage their council, board and committee meetings. Get hands-on training with all of the OnBase Agenda suite modules including: Agenda, Minutes, Agenda Online, Agenda To Go (iPad) and Agenda Media (video). We will cover hot topics like working with Tag Templates, customizing the Agenda Online website, and general usage of the apps and the latest base workflows.

12:45PM - 01:15PM

Lunch & Learn: Coming Soon

Details Coming Soon!

01:30PM - 05:00PM

561 Building the User Experience in OnBase

Details Coming Soon!

563 Advanced Unity Forms

Unity Forms are easy to build, but that doesn't mean they have to be simple. Add robust functionality to your Unity Forms with new features available in OnBase. In the Advanced Unity Forms course we'll explore the latest features available in Unity Forms: make forms easier to use with Cascading Datasets and Calculated Fields; add dynamic functionality to your forms with Custom Actions; use Signatures to verify form values; use the Drawing Control to capture graphical information on your forms; and more!

564 Workflow Timers (NEW)

Workflow Timers are a powerful mechanism for automatically executing workflow tasks. In this course we will show how to use them effectively within your Workflow Life Cycles. We'll discuss best practices for configuring and executing Workflow timer tasks. We'll introduce the Unity Scheduler, which is the preferred product for scheduling and running Workflow timer tasks. We'll compare the Workflow Timer Service with the Unity Scheduler and show how to migrate timer tasks from the former to the latter.

565 Web Server Security

This session focuses on enhancing the OnBase Web Server's security by exploring the various accounts used and what their permissions should be, how SSL/TLS affects the server, how Public-Key encryption works, and how to deploy the OnBase Web Server in a secure method.

566 Development Roadmap: Coming soon to OnBase!

Want to hear from OnBase Developers about what's coming in future versions of OnBase? Join VP of Development Bill Filion as we discuss OnBase development and solicit your feedback. Round out your week of TechQuest with this look into the future and leave feeling energized in knowing where OnBase is going!